

ADDENDUM #1 QUESTIONS AND ANSWERS



NOTICE OF SOLICITATION

SERIAL 06104-S

INVITATION FOR BID FOR: DOCUMENT REDACTION

Notice is hereby given sealed bids will be received by the Materials Management Department, Materials Management Center, 320 West Lincoln Street, Phoenix, Arizona 85003-2494, until 2:00 P.M./M.S.T. on **OCTOBER 10, 2006** for the furnishing of the following for Maricopa County bids will be opened by the Materials Management Director (or designated representative) at an open, public meeting at the above time and place.

All bids must be signed, sealed and addressed to the Materials Management Department, Materials Management Center, 320 West Lincoln Street, Phoenix, Arizona 85003-2494, and marked **"SERIAL 06104-S INVITATION FOR BID FOR DOCUMENT REDACTION."**

The Maricopa County Procurement Code ("The Code") governs this procurement and is incorporated by this reference. Any protest concerning this Invitation for Bid must be filed with the Procurement Officer in accordance with Section MC1-905 of the Code.

ALL ADMINISTRATIVE INFORMATION CONCERNING THIS INVITATION FOR BID AND THE CONTRACTUAL TERMS AND CONDITIONS CAN BE LOCATED AT <http://www.maricopa.gov/materials>. ANY ADDENDA TO THIS INVITATION FOR BID WILL BE POSTED ON THE MARICOPA COUNTY MATERIALS MANAGEMENT WEB SITE UNDER THE SOLICITATION SERIAL NUMBER.

BID ENVELOPES WITH INSUFFICIENT POSTAGE WILL NOT BE ACCEPTED BY THE MARICOPA COUNTY MATERIALS MANAGEMENT CENTER

DIRECT ALL INQUIRIES TO:

DAVE LAFOND
PROCUREMENT OFFICER
TELEPHONE: (602) 506-3248

THERE WILL BE A **MANDATORY** PRE-BID CONFERENCE ON **SEPTEMBER 20, 2006** AT 9:00 A.M., ARIZONA TIME, AT THE MARICOPA COUNTY MATERIALS MANAGEMENT DEPARTMENT, 320 WEST LINCOLN STREET, PHOENIX, ARIZONA 85003.

NOTE: MARICOPA COUNTY PUBLISHES ITS SOLICITATIONS ONLINE AND THEY ARE AVAILABLE FOR VIEWING AND/OR DOWNLOADING AT THE FOLLOWING INTERNET ADDRESS:

<http://www.maricopa.gov/materials/advbd/advbd.asp>

IF THIS DOCUMENT WAS DOWNLOADED FROM THE INTERNET, CONTACT THE
PROCUREMENT OFFICER FOR ANY REFERENCED DRAWINGS.

VENDORS MUST ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WITH THEIR BID

Signature:

Date:

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SERIAL 06104-S

NO RESPONSE

Respondents not responding to this Invitation for Bid are asked to complete this document and return it to Maricopa County Materials Management Department, 320 W. Lincoln St., Phoenix, AZ 85003-2494 or fax to 602/258-1573.

MARK OUTSIDE ENVELOPE "SERIAL 06104 -S"

Responses must be received **BY 2:00 P.M., October 10, 2006**. Respondents failing to submit a bid, or this document, may be subject to removal from the Maricopa County Materials Management Contractor List.

SERIAL: **06104-S**

TITLE: **DOCUMENT REDACTION**

CONTRACTOR NAME: _____

ADDRESS: _____

PHONE: _____ CONTACT: _____

REASON FOR NOT SUBMITTING A BID:

_____ Insufficient time
_____ Do not handle product/service
_____ Other: _____

IMPORTANT

PLEASE READ BEFORE SUBMITTING YOUR BID

M/WSBE CONTRACT PARTICIPATION

An M/WSBE goal has not been established for this procurement as there are no qualifying entities listed in the Minority/Women-Owned Small Business Enterprise Program Directory, nor did research reveal any qualified entities.

The Materials Management Department of Maricopa County will endeavor to ensure in every possible way that Minority and Women-owned Small Business firms shall have every opportunity to participate in providing professional services, materials, and contractual services to the Materials Management Department of Maricopa County without being discriminated against on the grounds of race, religion, sex, age or national origin. The Maricopa County Minority Business Program, effective January 1, 1992, is incorporated by reference.

INVITATION FOR BID FOR: DOCUMENT REDACTION

1.0 INTENT/BACKGROUND:

The mission of the Maricopa County Recorder's Office (Recorder's) is to maintain a perpetual, comprehensive set of public records consisting of all documents appropriately presented for recording; make the public records easily accessible for viewing by any member of the public; and delegate voter registration and election responsibility to the Elections Department, while maintaining strong leadership and administrative roles.

The Recorder's Office currently has records available for viewing on the Internet, dated from September 1991 to present. In addition, records, dated from 1871 to August 1991 will be available on the Internet in the future. Documents are available in their entirety for viewing. Some of these documents include social security numbers.

Due to the rise in identity theft in Arizona, the Recorder has taken the position that social security numbers should be removed from documents that are available on the Internet.

The Recorder's Office seeks bids to redact social security numbers from documents that are available on the Internet. There are approximately 82,331,020 images that need to be examined to determine if a social security number(s) is present on that image. Once the social security number is located, that information must be redacted. The redacted image will then be made available on the Internet at a future date.

2.0 SPECIFICATIONS:

2.1 TECHNICAL REQUIREMENTS:

2.1.1 The Contractor shall complete services under this Contract within six (6) months of notice of award or notice to proceed.

2.1.1.1 Contractor must review a minimum of 13,721,836 images a month and the specified information redacted in order to meet the project completion time. Respondent shall submit a detailed project plan to accommodate this time frame as part of its bid.

2.1.2 Social security number(s) is only the information to be redacted.

2.1.3 All images will be delivered and must be returned in a multi-page Group 4 tiff format 300 by 300 dpi.

2.1.4 Subcontractors **shall not** be used in performing services under this Contract.

2.1.5 This entire project must be performed onshore in a secure facility. No work is to be performed outside of the continental United States.

2.1.6 The production facility must meet specific security and safety standards as outlined below:

2.1.6.1 All Employees must wear identification badges (including employees' picture and name) at all times.

2.1.6.2 Visitors must register before entering facility.

2.1.6.3 Facility must have 24 x 7 manned security, including additional security safeguards within the production area.

2.1.6.4 No general access should be allowed in the production area.

- 2.1.6.5 Facility must have safeguards in place in case of a disaster (natural or otherwise).
- 2.1.6.6 Facility must have a climate controlled ANSI(American National Standard Institute) standard 125/2 vault in which non-production materials are stored. To provide the highest level of protection possible, vaults must be supervised during working hours, and access must be limited to authorized personnel. Vaults shall not be used as working spaces.
- 2.1.6.7 Facility must meet the National Fire Protection Association (NFPA) 232 standards..
- 2.1.6.8 Facility must have a backup and disaster recovery plan.
- 2.1.7 Redacting of data must be performed manually by an employee. Automated software redacting data **is not** permitted.
- 2.1.8 A second review of the image is mandatory and must be performed manually by an employee to ensure the correct data was redacted. Automated software for QA **is not** permitted.
- 2.1.9 The Contractor shall provide a warranty for the accuracy of the redacted data on the images for 5 years from completion of Contract period. Should the County find issue with any redacted data on the image(s) within this warranty period, the Contractor shall resubmit the image(s) with the correct redacted data.
- 2.1.10 The Contractor will hold the backup of all images for the length of the 5 year warranty period or until the County requests destruction at no extra charge to the County. Please provide the name and address of your offsite Vendor.
- 2.1.11 All products developed under this contract shall belong to the Maricopa County Recorder including the proprietary rights therein. The Contractor shall return to the Maricopa County Recorder all original materials supplied. If the materials are damaged during return shipment, at the Contractor facility or the Contractor damages an item during the redaction process, the Contractor shall be liable for the cost of restoring a usable copy.
- 2.1.12 The Contractor will provide the County with a day forward solution for automated redaction at no cost to the County.
- 2.1.13 The Contractor providing the redaction services must be the same Contractor that owns and maintains the day forward product.
- 2.1.14 The day forward redaction workflow product must be capable of manual (Assisted Redaction) and automatic (Auto Redaction).
- 2.1.15 The day forward redaction product must include all imaging and user interface toolkits/capabilities to perform accurate and efficient redactions.
- 2.1.16 The day forward product must have capabilities that will automatically highlight cues or keywords that are specific to a document type to allow the user to easily perform the redaction.
- 2.1.17 The Contractor must provide integration with the County's existing Recorder's Document Information System which is written in .Net. for this day forward auto redaction solution.

2.2 PROJECT MANAGEMENT:

- 2.2.1 The Project Manager in conjunction with the Recorder's Office, will manage and coordinate services under this Contract while the Contractor's Project Manager shall perform a similar function for the Contractor. The Recorder's Office Project Manager and the Contractor's Project Manager will serve as the principal points of communication between the two organizations. The objectives of the project management approach are: to ensure detailed forward planning for work breakdown and schedules at the task level, facilitate communication to maintain an efficient schedule, to report contract performance on an accurate and objective basis and to identify any problems or issues which may arise during performance of this project as early as possible.
- 2.2.2 Meetings with the Recorder's Office Project Manager may be required to discuss the task, as necessary, throughout the Contract period.

2.3 CONTRACTOR QUALIFICATIONS AND REQUIRED SUBMITTALS:

- 2.3.1 Contractor must have a good knowledge of real estate related transactions. Contractor shall submit, on letterhead, a statement of qualification including how many years its firm has been in this business and what major accounts have been serviced.
- 2.3.2 Contractor must be able to demonstrate that the facility, resources and employees are in place and ready to begin performance upon award of a Contract. Contractor shall provide a schematic of the facility to be used along with an organizational chart intended for this Contract.
- 2.3.3 Contractor shall submit the following as part of its bid:
 - 2.3.3.1 A written description of its security program.
 - 2.3.3.2 A copy of its disaster preparedness program.
 - 2.3.3.3 Written evidence of meeting NFPA 232 standards.
 - 2.3.3.4 Description of its vault.
 - 2.3.3.5 A copy of its backup and disaster recover plan(s).
 - 2.3.3.6 Audited financial statements covering the past two (2) years.
 - 2.3.3.7 A detailed description of their project management methodologies and client engagement process.
 - 2.3.3.8 As part of the County's due diligence, these requirements will be verified by the Recorder's Office via a formal inspection after bid submittals and prior to award of a contract.

2.4 ACCEPTANCE:

- 2.4.1 Accuracy rates of 99.95% must be guaranteed. The County will perform periodic test samples to ensure that these accuracy rates are being met. Periodic site visits may occur to ensure that these processes are being met.
- 2.4.2 Upon successful completion of the performance period, the redaction service shall be deemed accepted. All documentation shall be completed prior to final acceptance.

2.5 INVOICES AND PAYMENTS:

2.5.1 Payments will be granted to the Contractor upon delivery of images on required removable hard drives.

2.5.2 The Contractor shall submit two (2) legible copies of their detailed invoice before payment(s) can be made. At a minimum, the invoice must provide the following information:

- Company name, address and contact
- County bill-to name and contact information
- Contract Serial Number
- County purchase order number
- Invoice number and date
- Payment terms
- Date of service or delivery
- Quantity (number of days or weeks)
- Contract Item number(s)
- Description of Purchase (product or services)
- Pricing per unit of purchase
- Freight (if applicable)
- Extended price
- Mileage w/rate (if applicable)
- Arrival and completion time (if applicable)
- Total Amount Due

Problems regarding billing or invoicing shall be directed to the using agency as listed on the Purchase Order.

2.5.3 Payment will be made to the Contractor by Accounts Payable through the Maricopa County Vendor Express Payment Program. This is an Electronic Funds Transfer (EFT) process. After Award the Contractor shall fill out an EFT Enrollment form (to be provided by the Procurement Officer) or as located on the County Department of Finance Website as a fillable PDF document (www.maricopa.gov/finance/).

2.5.4 EFT payments to the routing and account numbers designated by the Contractor will include the details on the specific invoices that the payment covers. The Contractor is required to discuss remittance delivery capabilities with their designated financial institution for access to those details.

2.6 TAX:

No tax shall be levied against labor. It is the responsibility of the Contractor to determine any and all taxes and include the same in proposal price.

2.7 DELIVERY:

2.7.1 Delivery of the redacted images shall be made on transportable hard disk drives compatible with Microsoft Windows 2000/XP NTFS file system. Each drive shall be labeled with the beginning and ending recording number, the date completed and the indicator Maricopa County Recorder redacted images.

2.7.2 It shall be the Contractor's responsibility to meet the proposed delivery requirement of six (6) months from date of award of contract. Maricopa County reserves the right to obtain services on the open market in the event the Contractor fails to make delivery and any price differential will be charged against the Contractor.

2.8 OPTION TO PURCHASE AUTO-INDEXING SOFTWARE:

- 2.8.1 The Recorder's Office would like the option to purchase auto indexing software. This option to purchase would be dependent upon whether the auto indexing solution would have the ability to automatically index the majority of the recorded documents with an accuracy level that would be acceptable to the Maricopa County Recorder.
- 2.8.2 An acceptance test would be defined after this Contract is awarded.
- 2.8.3 The Contractor that would provide the auto indexing software must be the same Contractor who provides the redaction software. The Contractor must own and maintain this software.
- 2.8.4 Third party contractors **will not** be permitted.
- 2.8.5 The software must have the ability to automatically adapt to changing document formats including the following:
 - 2.8.5.1 Location of index information on the page;
 - 2.8.5.2 Context – Patterns of the words around the information to be extracted; and
 - 2.8.5.3 Location of the index information in the document.
- 2.8.6 The software must have the ability to extract party names and other information based on keywords, content or location as appropriate to the document type and format.
- 2.8.7 The software must be able to be integrated with the current Recorder's Document Information System.
- 2.8.8 The Contractor would receive a large sample of the recorded documents from the Recorder's Office for testing.
- 2.8.9 The Contractor must run the auto indexing software on all, or some of these documents and present the results to the Recorder's Office for evaluation.
- 2.8.10 A minimum of 1,000,000 documents would need to be tested with the auto indexing software so as to ensure a quality sample.

3.0 SPECIAL TERMS & CONDITIONS:

3.1 CONTRACT TERM:

This Invitation for Bid is for awarding a firm, fixed price purchasing contract to cover a six (6) month period.

3.2 OPTION TO EXTEND:

The County may, at their sole discretion, extend the contract on a month-to month-bases for a maximum of six (6) months after expiration.

3.3 INDEMNIFICATION AND INSURANCE:

3.3.1 INDEMNIFICATION

To the fullest extent permitted by law, Contractor shall defend, indemnify, and hold harmless County, its agents, representatives, officers, directors, officials, and employees from and against all claims, damages, losses and expenses, including, but not limited to, attorney fees, court costs, expert witness fees, and the cost of appellate proceedings,

relating to, arising out of, or alleged to have resulted from the negligent acts, errors, omissions or mistakes relating to the performance of this Contract. Contractor's duty to defend, indemnify and hold harmless County, its agents, representatives, officers, directors, officials, and employees shall arise in connection with any claim, damage, loss or expense that is attributable to bodily injury, sickness, disease, death, or injury to, impairment, or destruction of property, including loss of use resulting there from, caused by any negligent acts, errors, omissions or mistakes in the performance of this Contract including any person for whose acts, errors, omissions or mistakes Contractor may be legally liable.

The amount and type of insurance coverage requirements set forth herein will in no way be construed as limiting the scope of the indemnity in this paragraph.

The scope of this indemnification does not extend to the sole negligence of County.

3.4 INSURANCE REQUIREMENTS

Contractor, at Contractor's own expense, shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of B++6. In lieu of State of Arizona licensing, the stipulated insurance may be purchased from a company or companies, which are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County. The form of any insurance policies and forms must be acceptable to County.

All insurance required herein shall be maintained in full force and effect until all work or service required to be performed under the terms of the Contract is satisfactorily completed and formally accepted. Failure to do so may, at the sole discretion of County, constitute a material breach of this Contract.

Contractor's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it.

Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect the County's right to coverage afforded under the insurance policies.

The insurance policies may provide coverage that contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to County under such policies. Contractor shall be solely responsible for the deductible and/or self-insured retention and County, at its option, may require Contractor to secure payment of such deductibles or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.

County reserves the right to request and to receive, within 10 working days, certified copies of any or all of the herein required insurance policies and/or endorsements. County shall not be obligated, however, to review such policies and/or endorsements or to advise Contractor of any deficiencies in such policies and endorsements, and such receipt shall not relieve Contractor from, or be deemed a waiver of County's right to insist on strict fulfillment of Contractor's obligations under this Contract.

The insurance policies required by this Contract, except Workers' Compensation, and Errors and Omissions, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insureds.

The policies required hereunder, except Workers' Compensation, and Errors and Omissions, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Contractor's work or service.

Contractor is required to procure and maintain the following coverages indicated by a checkmark:

3.4.1 Commercial General Liability:

Commercial General Liability insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than \$1,000,000 for each occurrence, \$2,000,000 Products/Completed Operations Aggregate, and \$2,000,000 General Aggregate Limit. The policy shall include coverage for bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provision which would serve to limit third party action over claims. There shall be no endorsement or modification of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.

3.4.2 Workers' Compensation:

Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Contractor's employees engaged in the performance of the work or services under this Contract; and Employer's Liability insurance of not less than \$100,000 for each accident, \$100,000 disease for each employee, and \$500,000 disease policy limit.

Contractor waives all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Contractor pursuant to this Contract.

3.4.3 Certificates of Insurance.

3.4.3.1 Prior to commencing work or services under this Contract, Contractor shall have insurance in effect as required by the Contract in the form provided by the County, issued by Contractor's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Contract are in full force and effect. Such certificates shall be made available to the County upon 48 hours notice. **BY SIGNING THE AGREEMENT PAGE THE CONTRACTOR AGREES TO THIS REQUIREMENT AND FAILURE TO MEET THIS REQUIREMENT WILL RESULT IN CANCELLATION OF CONTRACT.**

In the event any insurance policy (ies) required by this contract is (are) written on a "claims made" basis, coverage shall extend for two years past completion and acceptance of **Contractor's** work or services and as evidenced by annual Certificates of Insurance.

If a policy does expire during the life of the Contract, a renewal certificate must be sent to **County** fifteen (15) days prior to the expiration date.

3.4.3.2 Cancellation and Expiration Notice.

Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to the County.

3.5 PROCUREMENT CARD ORDERING CAPABILITY:

It is the intent of Maricopa County to utilize a procurement card that may be used by the County from time to time, to place and make payment for orders under the Contract. Respondents without this capability may be considered non-responsive and not eligible for award consideration.

3.6 ESTIMATED QUANTITIES.

The Respondent understands and hereby acknowledges that the County makes no representations nor guarantees the Respondent any minimum or maximum number of units of service to be provided under this Contract

3.7 ORDERING AUTHORITY.

3.7.1 Respondents should understand that any request for purchase of materials or services shall be accompanied by a valid purchase order, issued by Materials Management, or by a Certified Agency Procurement Aid (CAPA).

3.7.2 Maricopa County departments, cities, other counties, schools and special districts, universities, nonprofit educational and public health institutions may also purchase from under this Contract at their discretion and/or other state and local agencies (Customers) may procure the products under this Contract by the issuance of a purchase order to the Respondent. Purchase orders must cite the Contract number.

3.7.3 Contract award is in accordance with the Maricopa County Procurement Code. All requirements for the competitive award of this Contract have been met. A purchase order for the products is the only document necessary for Customers to purchase and for the Respondent to proceed with delivery of materials available under this Contract.

3.7.4 Any attempt to represent any product not specifically awarded under this Contract is a violation of the Contract. Any such action is subject to the legal and contractual remedies available to the County, inclusive of, but not limited to, Contract cancellation, suspension and/or debarment of the Respondent.

3.8 INQUIRIES AND NOTICES:

All inquiries concerning information herein shall be addressed to:

Maricopa County
Materials Management Department
ATTN: CONTRACT ADMINISTRATION
320 West Lincoln Street
Phoenix, Arizona 85003

Administrative telephone inquiries shall be addressed to:

David LaFond, Procurement Officer, 602-506-3248
(lafondd@mail.maricopa.gov)

Inquiries may be submitted by telephone but must be followed up in writing. No oral communication is binding on Maricopa County.

3.9 EVALUATION CRITERIA.

3.9.1 The evaluation of Bids will be based on, but will not be limited to, the following:

3.9.1.1 Compliance with specifications.

3.9.1.2 Price.

3.9.1.3 Determination of Responsibility.

3.9.2 The County reserves the right to award in whole or in part, by item or group of items, by section or geographic area, or make multiple awards, where such action serves the County's best interest.

3.10 SUBMISSION PRICE CLARITY.

For reasons of clarity all submissions of pricing (Attachment A) shall be priced in the same unit (size, volume, quantity, weight, etc.) as the bid specifications request. Submissions (bids) failing to comply with this requirement may be declared non-responsive.

3.11 INSTRUCTIONS FOR PREPARING AND SUBMITTING BIDS.

Respondents shall provide one (1) original hardcopy (labeled), three (3) hardcopy copies and one (1) electronic copy that includes pricing, on CD. Respondents are to identify their responses with the bid serial number, title and return address to Maricopa County, Department of Materials Management, 320 West Lincoln, Phoenix, Arizona 85003. **The owner, corporate official or partner who has been authorized to make such commitments must sign bids.**

3.12 RESPONDENT REVIEW OF DOCUMENTS.

The Respondent must review its Bid submission to assure the following requirements are met.

3.12.1 **Mandatory:** One (1) original hardcopy (labeled), two (2) hardcopy copies of Catalogs and/or Price Lists and one (1) electronic copy of pricing on a CD;

3.12.2 **Mandatory:** Attachment "A", Pricing;

3.12.3 **Mandatory:** Attachment "B", Agreement; and

3.12.4 **Mandatory:** Attachment "C", References.

3.12.5 **Mandatory:** Information required by 2.3 Contractor Qualifications and Required submittals.

3.13 POST AWARD MEETING:

The successful Respondent(s) shall be required to attend a post-award meeting with the Using Agency to discuss the terms and conditions of the Contract. This meeting will be coordinated by the Procurement Officer of the Contract.

NOTE: RESPONDENTS ARE REQUIRED TO USE ATTACHED FORMS TO SUBMIT THEIR PROPOSALS.

**ATTACHMENT A
PRICING**

SERIAL: 06104-S

BLANKET ORDER: B0700207

COMMODITY CODE: NIGP 92007

BIDDER NAME: _____

VENDOR # : _____

BIDDER ADDRESS: _____

P.O. ADDRESS: _____

BIDDER PHONE #: _____

BIDDER FAX #: _____

COMPANY WEB SITE: _____

COMPANY CONTACT (REP): _____

E-MAIL ADDRESS (REP): _____

WILLING TO ACCEPT FUTURE SOLICITATIONS VIA EMAIL: ____ YES ____ NO

ACCEPT PROCUREMENT CARD: ____ YES ____ NO

REBATE (CASH OR CREDIT) FOR UTILIZING PROCUREMENT CARD: ____ YES ____ NO ____ % REBATE

(Payment shall be made within 48 hrs utilizing the Purchasing Card)

INTERNET ORDERING CAPABILITY: ____ YES ____ NO ____ % DISCOUNT

OTHER GOVERNMENT AGENCIES MAY USE THIS CONTRACT: ____ YES ____ NO

PAYMENT TERMS: BIDDER IS REQUIRED TO PICK ONE OF THE FOLLOWING.

PAYMENT TERMS WILL BE CONSIDERED IN DETERMINING LOW BID.

FAILURE TO CHOOSE PAYMENT TERMS WILL RESULT IN A DEFAULT TO NET 30.

BIDDER MUST INITIAL THE SELECTION BELOW.

NET 10 _____

NET 15 _____

NET 20 _____

NET 30 _____

NET 45 _____

NET 60 _____

NET 90 _____

2% 10 DAYS NET 30 _____

1% 10 DAYS NET 30 _____

2% 30 DAYS NET 31 _____

1% 30 DAYS NET 31 _____

5% 30 DAYS NET 31 _____

INDICATE PERCENTAGE OF M/WBE PARTICIPATION IF ANY HERE: ____%

PLEASE INDICATE HOW YOU HEARD ABOUT THIS SOLICITATION:

____ NEWSPAPER ADVERTISEMENT

____ MARICOPA COUNTY WEB SITE

____ POSTAL MAIL PRE-SOLICITATION NOTICE

____ E-MAIL PRE-SOLICITATION NOTICE

____ OTHER (PLEASE SPECIFY)

ALL PRICING SHALL BE SUBMITTED ON THE SAME CD AS THE BID AND FORMATTED IN EXCEL '2003. BIDS WILL NOT BE ACCEPTED WITHOUT THE ACCOMPANYING CD IN YOUR SUBMITTAL. ANY RESPONSE NOT CONTAINING THE REQUIRED CD MAY BE CONSIDERED NON-RESPONSIVE AND NOT CONSIDERED FOR EVALUATION OR CONTRACT AWARD.

**ATTACHMENT A
PRICING**

1.0 PRICING:

	ESTIMATED QUANTITY	UNIT PRICE	EXTENDED AMOUNT
1.1 Per image to redact social security number	82,331,020		
1.2 Option to purchase auto-indexing software	1		

ATTACHMENT B

AGREEMENT

Respondent hereby certifies that respondent has read, understands and agrees that acceptance by Maricopa County of the Respondent's Bid will create a binding Contract. Respondent agrees to fully comply with all terms and conditions as set forth in the Maricopa County Procurement Code, and amendments thereto, together with the specifications and other documentary forms herewith made a part of this specific procurement

BY SIGNING THIS PAGE THE SUBMITTING RESPONDENT CERTIFIES THAT RESPONDENT HAS REVIEWED THE ADMINISTRATIVE INFORMATION AND DRAFT IFB CONTRACT'S TERMS AND CONDITIONS LOCATED AT <http://www.maricopa.gov/materials>. AND AGREE TO BE CONTRACTUALLY BOUND TO THEM.

MINORITY/ WOMEN-OWNED SMALL BUSINESSES (check appropriate item):

_____ Disadvantaged Business Enterprise (DBE)
 _____ Women-Owned Business Enterprise (WBE)
 _____ Minority Business Enterprise (MBE)
 _____ Small Business Enterprise (SBE)

 RESPONDENT SUBMITTING PROPOSAL

 FEDERAL TAX ID NUMBER

 PRINTED NAME AND TITLE

 AUTHORIZED SIGNATURE

 ADDRESS

 TELEPHONE

 FAX #

 CITY STATE ZIP

 DATE

 WEB SITE:

 EMAIL ADDRESS:

MARICOPA COUNTY, ARIZONA

BY: _____
 DIRECTOR, MATERIALS MANAGEMENT

 DATE

BY: _____
 CHAIRMAN, BOARD OF SUPERVISORS

 DATE

ATTESTED:

 CLERK OF THE BOARD

 DATE

APPROVED AS TO FORM:

 DEPUTY MARICOPA COUNTY ATTORNEY

 DATE

ATTACHMENT C

CONTRACTOR REFERENCES

RESPONDENT SUBMITTING BID: _____

1. COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON: _____

TELEPHONE: _____ E-MAIL ADDRESS: _____

2. COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON: _____

TELEPHONE: _____ E-MAIL ADDRESS: _____

3. COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON: _____

TELEPHONE: _____ E-MAIL ADDRESS: _____

4. COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON: _____

TELEPHONE: _____ E-MAIL ADDRESS: _____

5. COMPANY NAME: _____

ADDRESS: _____

CONTACT PERSON: _____

TELEPHONE: _____ E-MAIL ADDRESS: _____

EXHIBIT 1 VENDOR REGISTRATION PROCEDURES

On-line Vendor Registration at Maricopa County is available NOW!

On November 22, 2004, Maricopa County changed its vendor registration process. Paper forms will no longer be accepted. Vendor registrations will only be accepted through the active website. Register at <http://www.maricopa.gov/Materials/>

The new process will give you full control over your organizational information. Please be advised however that you are now directly responsible for the presence and accuracy of your company's information.

Vendors currently registered in our system who have changes to their information or have not registered online must establish a new account via the above web site link. Materials Management will no longer post changes to existing vendor records.

Procurement vendors: Be sure to select those commodity codes that best represent the commodities and or services provided by your organization. Non-procurement registrants may ignore the commodity portion.

Registration is **FREE**. You may use any computer with web access for registration, record updating and maintenance.

If you have any questions, email us at VendorReg@mail.maricopa.gov.

PRE-BID CONFERENCE QUESTIONS AND ANSWERS

1. **QUESTION:**

In Section 2.1.12, it states that “The Contractor will provide the County with a day forward solution for automated redaction at no cost to the County”. Although the wording is “solution”, this implies to us that the Contractor will provide software licenses at no charge to the County, which is not industry-standard. Is this correct?

ANSWER:

You might include the cost for upgrades of software or maintenance into your bid pricing, but there would be no charge to integrate into our system.

2. **QUESTION:**

In Section 2.1.13, it states that “The Contractor providing the redaction services must be the same Contractor that owns and maintains the day forward product”. Does this requirement eliminate vendors that use third-party redaction software, not one that they developed, to provide the service? The term “owns” implies that the vendor owns every piece of the solution for a day-forward redaction product. Each potential vendor uses third party components as a licensee.

EXAMPLE: The use of Optical Character Recognition Software is licensed to be used within each potential vendor’s solution. Furthermore, we have many established partnerships with organizations that license the integrated use of our ID Shield Redaction technology within their end-to-end solution.

Could you please further clarify this requirement?

ANSWER:

As long as you provide a single point of support and maintenance through the company whose product you are licensed with would be acceptable. However, keep in mind, the County will not tolerate a situation involving a technical problem and have the contractor pleading that it’s not his fault, but that of their software supplier. This situation will not absolve a contractor of full responsibility to provide satisfactory and timely services.

3. **QUESTION:**

How many images do you review before a redaction comes up?

ANSWER:

This is unknown, as there is no rhyme, nor reason as to why one deed may contain an ssan, while another does not.

4. **QUESTION:**

What document types would be the most common ones to contain an ssan (mortgage, re-conveyances, etc.)?

ANSWER:

Any document submitted for recording may contain an ssan. However, federal and state tax liens contain an ssan as well as releases of federal and state tax liens. Child support liens and judgments are a couple more examples, however this is not limited to these types of documents.

PRE-BID CONFERENCE QUESTIONS AND ANSWERS

5. **QUESTION:**

What does the current image directory structure and file naming look like”

ANSWER:

Recorded documents are assigned a recording number such as, 20050302149 (2005 = the year). The first document recorded for the calendar year 2005 would be 2005000001 and then numbered sequentially forward.

6. **QUESTION:**

If a vendor were to keep all the images in their secure facility, would you allow offshore data capture to be performed by company employees overseas via Citrix connection to achieve the best possible conversion timeline?

ANSWER:

No.

7. **QUESTION:**

In order to achieve the conversion timeframe, can a vendor perform work in multiple US offices that share the security standards mentioned in the solicitation?

ANSWER:

No.

8. **QUESTION:**

Will the County provide a standard of performance with regard to ‘accuracy’?

EXAMPLES: Would redaction of 8 digits of an ssan be considered a defect?

If redaction obscures one letter of text before or after the ssan, is that a defect?

ANSWER:

Level of accuracy will be set with the successful bidder after award and before performance begins.

Redaction of 8 digits of an ssan would not be considered a defect.

Redaction obscuring of one letter of text would not be considered a defect.

9. **QUESTION:**

Option for auto indexing software. Has the County established any requirements around the auto indexing software?

ANSWER:

As mentioned in the pre-bid conference, the County anticipates using auto indexing software to capture the grantor/grantee data and possibly the legal description.

PRE-BID CONFERENCE QUESTIONS AND ANSWERS

10. **QUESTION:**

Please confirm that the County will not be providing a sample set for suppliers to benchmark productivity and accuracy uniformly.

ANSWER:

We will not be providing a sample set. We will compare the information the auto indexing software capture against the information we already have.

EXAMPLE: We will provide recorded documents to you, then use your auto indexing software against the recorded documents, then we will compare the information your software picks up against the information we have for the same set of recorded documents.

11. **QUESTION:**

Are there any requirements around how the documents will be organized on the hard drive (e.g. Date, Document type, etc.)?

ANSWER:

All documents received will be in date order and by recording order.

EXAMPLE: For the Calendar year 2005, you will receive the first business day in January 2005 starting with the first recording number assigned for the first document presented for recording, such as 20050000001, forward.

12. **QUESTION:**

Are there any document types that are proven NOT to have an ssan?

ANSWER:

Documents are prepared by many entities. There is no rhyme, nor reason for why or how some documents have ssan's while others do not.

EXAMPLE: Some lenders felt that it was necessary to include the borrower's ssan under the signature line. Deeds transferring properties into trusts may contain the ssan's of some or all the involved parties. A Power of Attorney may contain an ssan while another may not.

13. **QUESTION:**

Is the statement, "all products developed under this contract' limited to the images and metadata deliverables or does it include the software written and utilized at the vendor's production facility or software provided for the day-forward and/or indexing solutions?

ANSWER:

If the software is developed by the vendor, using funding received through the contract, in order to perform the services, the County would take title to the software, as it was developed with County funding. However, if the software is independently developed at no cost to the County, the vendor could retain title.

PRE-BID CONFERENCE QUESTIONS AND ANSWERS

14. **QUESTION:**

We use multiple facilities for secure data storage, backup and disaster recovery. We plan to store all images within a secure facility then access them for redaction processing from another location. This means the images will be maintained in one facility, while the people processing these images will be located in another facility. Is this configuration acceptable to the County?

ANSWER:

Yes, but only if the images themselves are secured and the vendor uses a secured network then accessing the images.

15. **QUESTION:**

Option to purchase auto indexing software. Our automated indexing solution will meet the requirements state in the solicitation. Our solution is priced according to annual recording volume. Please provide the annual recording volume for Maricopa County over the past three years.

ANSWER:

2003 = 1,742,150 2004 = 1,538,163 2005 = 1,961,476